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# LandTracker Administrator



- Customise your database to store all the information you need
- Modify your LandTracker actions to fit your business processes
- Create generic, on demand and recurring custom actions
- Create custom reports and alerts
- Segregate your data to customise your users' experience
- Use standard Excel reports
- Work with Due Diligence to monitor compliance on your competitors (including reporting and bulk quick appraisals)
- Control user access
- Gain familiarity with the LandTracker user guide

[Session 1] Introduction

[Session 2] Basics of LandTracker - revision

Morning Tea

[Session 3] Templates, Action Definitions and Ad hoc actions

Lunch

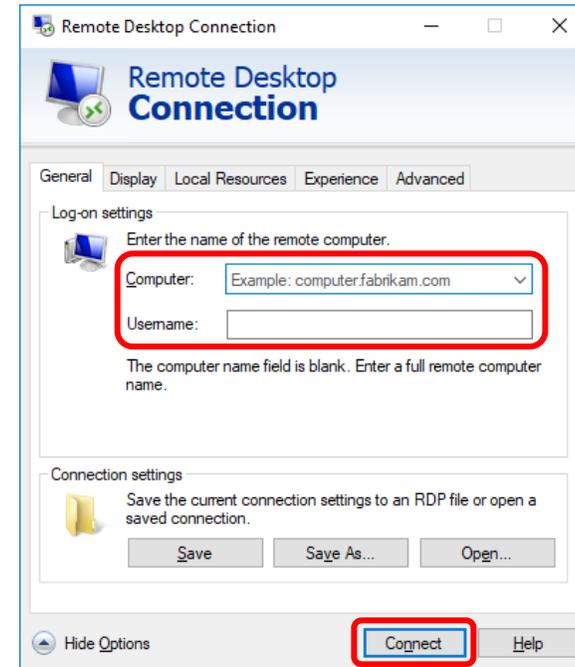
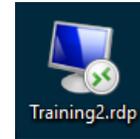
[Session 4] User administration, groups and global filters

Afternoon Tea

[Session 5] Views, Merge and Alerts

# Connect to Resources

- Connect to Wi-Fi – see whiteboard for logon details
- To connect to Virtual Machine from your laptop:
  1. Double-click the shortcut you have been given
  2. Fill in the logon settings as shown on the whiteboard
  3. Click *Connect*



- The 'LandTracker Administration' folder on desktop contains files you'll use & this where you will save anything you create
- Open LandTracker. You each have your own copy of the same training database with sample data that will be used in each exercise
- You will also use the LandTracker user guide and Tenement Management Wiki throughout this course



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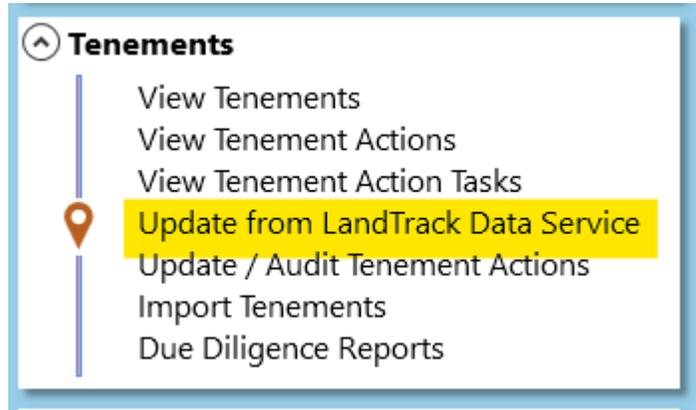
# Basics of LandTracker

LandTracker Administrator

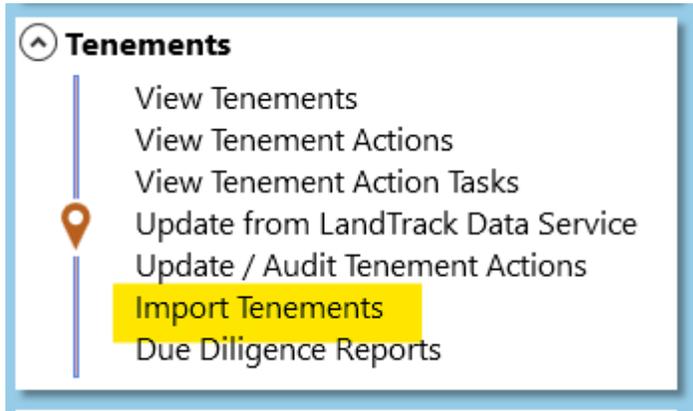


- Overview of LandTracker functionality that you may have missed
  - Importing & updating Tenements
  - Updating Actions
  - Agreements and Agreement Actions
  - Document management
  - Managing Contacts
  - Creating and using Test databases

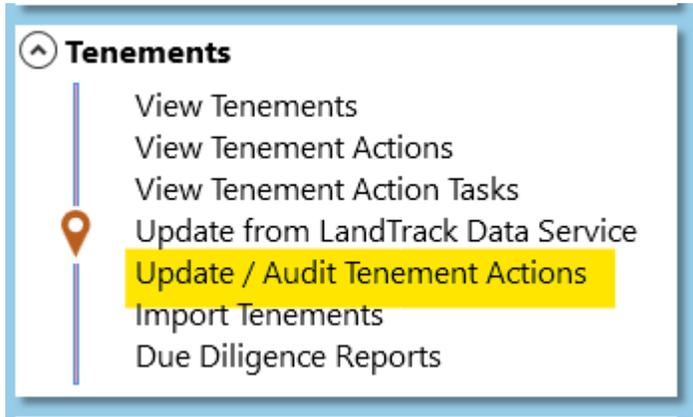
# Updating Tenements



- Global Filter: Update filtered or update all – Why?
- Recommendation: Review updates carefully

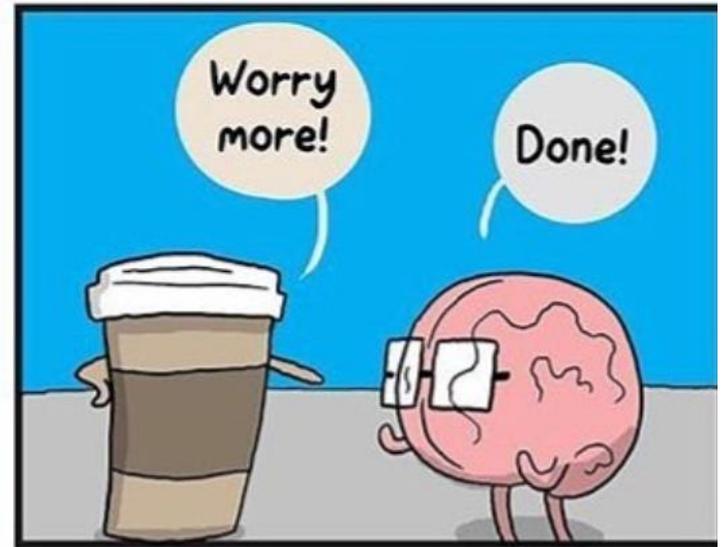


- Holder search
- Eastern Goldfields
- Select all – Cog top left
- Assign to groups: Managed
- Discuss: Why do we have tenements that may not be managed?
- Import
- Review



- Same as update tenements
  - Review!
- Discuss: How often do we update tenement data and actions?

- Updating Tenement data
  - [#164 - Update from LandTrack Data Service](#)
- Importing Tenements
  - [#182 - Import Tenements](#)
- Updating Actions
  - [#227 - Update / Audit Actions](#)
- Agreements and Agreement Actions
  - [#166 – View Agreements](#)
- Documents
  - [#211 – Manage Documents](#)
- Contacts
  - [#168 – View Contacts](#)
- Create and manage test databases
  - [#170 – Manage Database Connections](#)





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# Templates

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- Understand the components of an Asset Template
- Understand the purpose of different templates
- Customise an existing Template to include custom fields
- Add a custom table to a Template
- Bulk import data to your new table
- Know how to keep custom templates up to date with new features

# What is a Template?

- Form designer
  - Specifies the layout on the Details pane

## Agreement template

{Name?}: {Code?}

Agreement Summary			
Actual Name	{Name}	Agreement No	{Code}
Alias Name	{AliasName}	Royalty	{RoyaltyPercentage}
Status	{Status?}	Royalty Type	{RoyaltyType}
Drafting Start Date	{DraftingStartDate}	Mineral Type	{RoyaltyMineral}*
Commencement Date	{CommencementDate}	Expiry Date	{ExpiryDate}
Settlement Date	{SettlementDate}	OSR* Stamp	{StampedDate}

Internal Fields	
Responsible Geo	{ResponsibleGeo}®
Managing Company	{Manager?}
Tenement Manager	{TenMan?}

Mount Turnip Joint Venture: JV-0000

### Agreement Summary

Actual Name	Mount Turnip Joint Venture	Agreement No	JV-0000
Alias Name	MtTurnip	Royalty	
Status	Current	Royalty Type	
Drafting Start Date		Mineral Type	
Commencement Date	01-Jan-2018	Expiry Date	30-Dec-2020
Settlement Date		OSR Stamp	

### Internal Fields

Responsible Geo		Tenement Manager	
Managing Company			

- Defines which fields and child tables ('Related Data') to include, and how they should be labelled
- Created in Word and then imported into LandTracker
- [User Guide: #178 – About Asset Templates](#)

- Why would you edit a template?

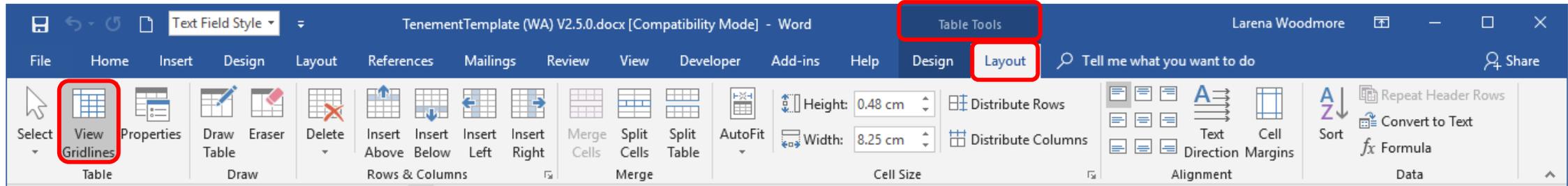
- Data keeping: Create a place to store all relevant data in LandTracker – no need to maintain separate spreadsheets
- Reporting: Storing all data in one place enables better reporting for less effort
- Filtering: Record the information required to organise subsets of your Assets and Actions into manageable chunks
- [User Guide: #193 – Editing Templates](#)

# Editing Templates

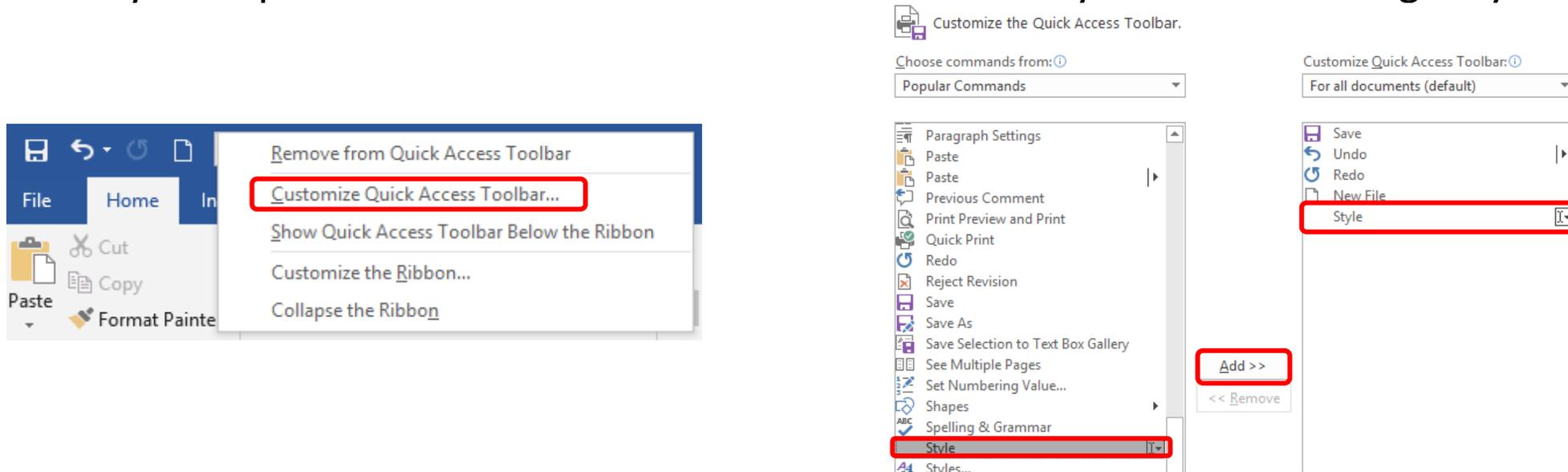
- Add a custom field to the Tenement template:
- *Cost Code*
- [User Guide: #193 – Editing Templates](#)

# Editing Templates - Hints & Tips

- Make sure gridlines are turned on when editing templates.
  1. Click inside any table
  2. On the *Table Tools > Layout* tab, click *View Gridlines*



- Add the Style dropdown to the Quick Launch toolbar to easily check and change styles.



# Editing Templates - Exercise

7

- Add a Related Data table:
- *S40E*
- [User Guide: #193 – Editing Templates](#)

- Quickly import related data from Excel to LandTracker using copy & paste
- Rules:
  - Columns in Excel & LandTracker need to be in the same order
  - Make the first column the Parent – the *unique* Name &/or Code of the Tenement or Agreement
  - [User Guide: #219 – Import Related Data](#)

# Exercise: Import Related Data

- Import S40e data
- *S40e Import.xlsx*
- [User Guide: #219 – Import Related Data](#)

## Tenement templates

Based on the fields and tables available from each jurisdiction's mines department and other sources

Can be customised to include fields or tables relevant to your business

## Agreement template

Based on the fields and tables most commonly used by our clients

Customisation is recommended:

- Agreement Types and abbreviations
- Add fields and tables relevant to your business, and to remove those that aren't
- Your numbering sequence

- [User Guide: #178 - About Asset Templates](#)

# Changes to standard templates

- Recent changes are highlighted yellow and shown in Change History

## Compliance<sup>1</sup>

Name	Type	Status	DueDate	Amount	Details
{Name}	{Type}	{Status}	{DueDate}	{Amount} <sup>2</sup>	{Details}

## Native Title Referrals<sup>3</sup>

Referral	Referral Date	Referral Type	Current Status	Procedure	Section 29 Notification Date	Section 29 Notification Close Date	Procedure Outcome Date
{Name} <sup>4</sup>	{referredDate}	{referralType}	{currentStatus}	{procedure}	{notificationDate}	{notificationCloseDate}	{procedureOutcomeDate}

## Templates

Type	Jurisdiction	Code	SubType	Version	Comment
Tenement	WA	P	Prospecting Licence		
Tenement	WA	E	Exploration Licence	Pre 2006	Old E's applied for prior to 10/2/2006
Tenement	WA	E	Exploration Licence	Post 2006	New Mining act E (5 years, year 6 drop off)

## Change History

Date	Version	Changes
09/05/2018	2.5.0	Added Compliance section
02/05/2018	2.5.0	Added Native Title Referrals section

<sup>1</sup> Template="Compliance"

<sup>2</sup> Type="Money"

<sup>3</sup> Template="NTAReferralLinks"

<sup>4</sup> Link="Proceeding" CopyMatchedFields="true"

- Update changed fields on Related records

Summary Related Data Details Actions Links Documents Map				
Notes Parties Related Agreements Related Tenements (3) Related Land Status Log				
Summary Terms Recorded Expenditure Payments				
Related Tenement	Tenement Status	Commencement Date	Expiry	
<a href="#">E45/3574</a>	Pending	20-May-2013		
<a href="#">E45/3576</a>	Live	20-May-2013	19-May-2023	
<a href="#">E45/3577</a>	Live	20-May-2013	19-May-2023	

Summary Related Data Details Actions Links Documents Map				
Notes Parties Related Agreements Related Tenements (3) Related Land Status Log				
Summary Terms Recorded Expenditure Payments				
Related Tenement	Tenement Status	Commencement Date	Expiry	
<a href="#">E45/3574</a>	Live	20-May-2013	19-May-2023	
<a href="#">E45/3576</a>	Live	20-May-2013	19-May-2023	
<a href="#">E45/3577</a>	Live	20-May-2013	19-May-2023	

- Create the reverse link, e.g.
  - You've added a Related Tenement to an Agreement. This will add the Agreement to the Related Agreements table on the Tenement

Summary Related Data Details Actions Links Documents Map				
Notes Parties Related Agreements Related Tenements (3) Related Land Status Log				
Summary Terms Recorded Expenditure Payments				
Related Tenement	Tenement Status	Commencement Date	Expiry	
<a href="#">E45/3574</a>	Live	20-May-2013	19-May-2023	

Summary Related Data Details Actions Links Documents Map				
Holders (1) Dealings (11) Rent (6) Expenditure (6) Conditions & Endorsements (2)				
Related Agreements (1) Shires (1) Rates MRF (3) Compliance (4) Native Title R				
Section 40E Permits				
Related Agreement	Status	Commencement Date	Expiry Date	Parties
<a href="#">Mount Turnip Joint Venture</a>	Current	01-Jan-2018	30-Dec-2020	





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# Lunch





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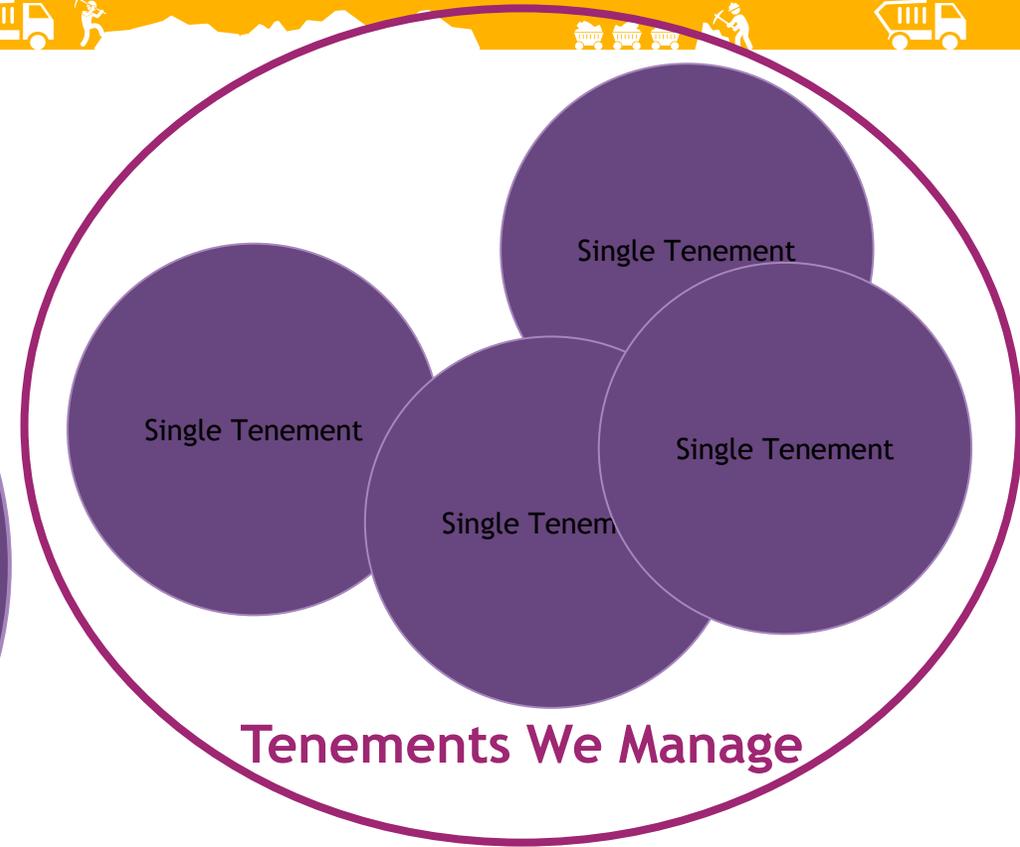
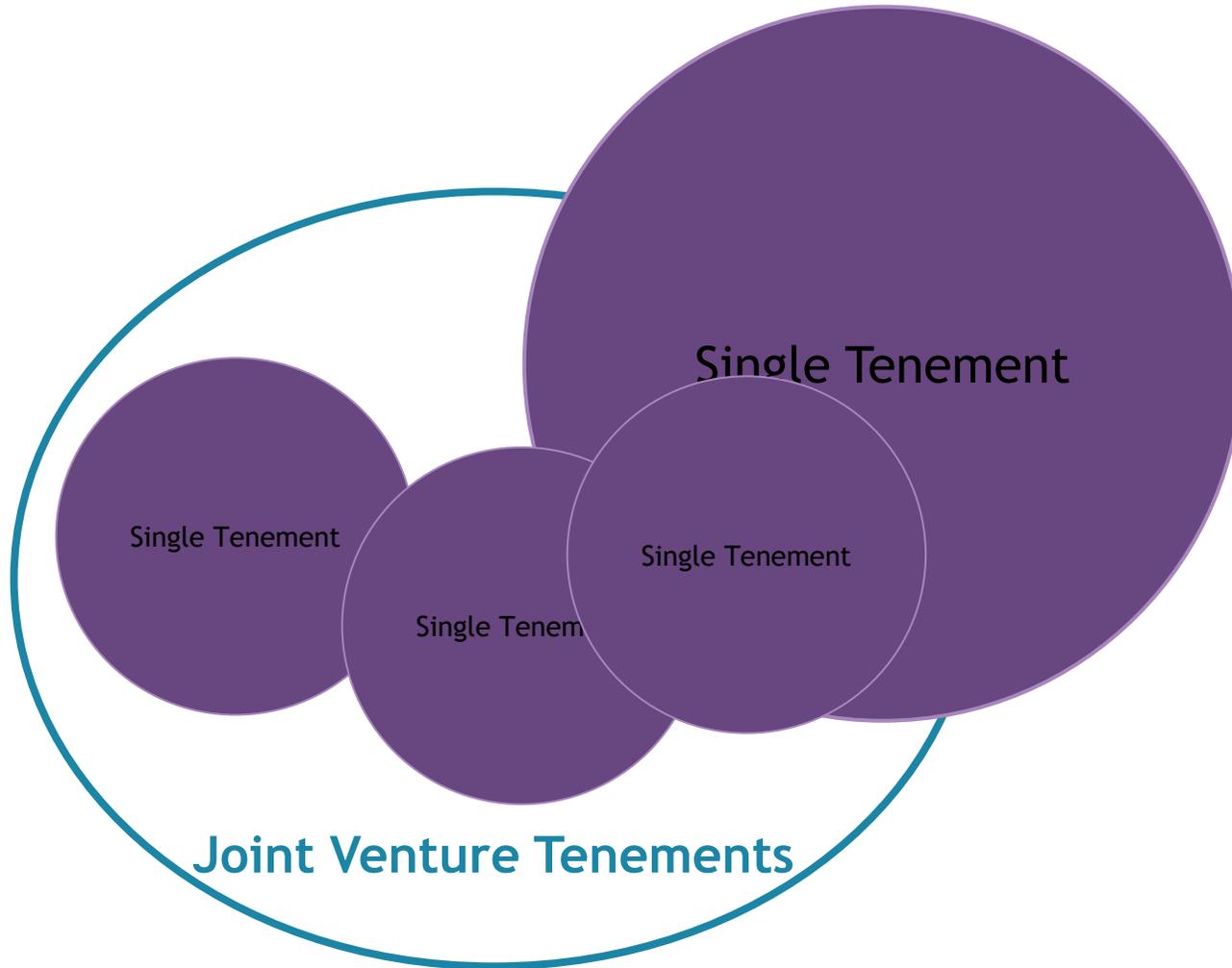
# Groups

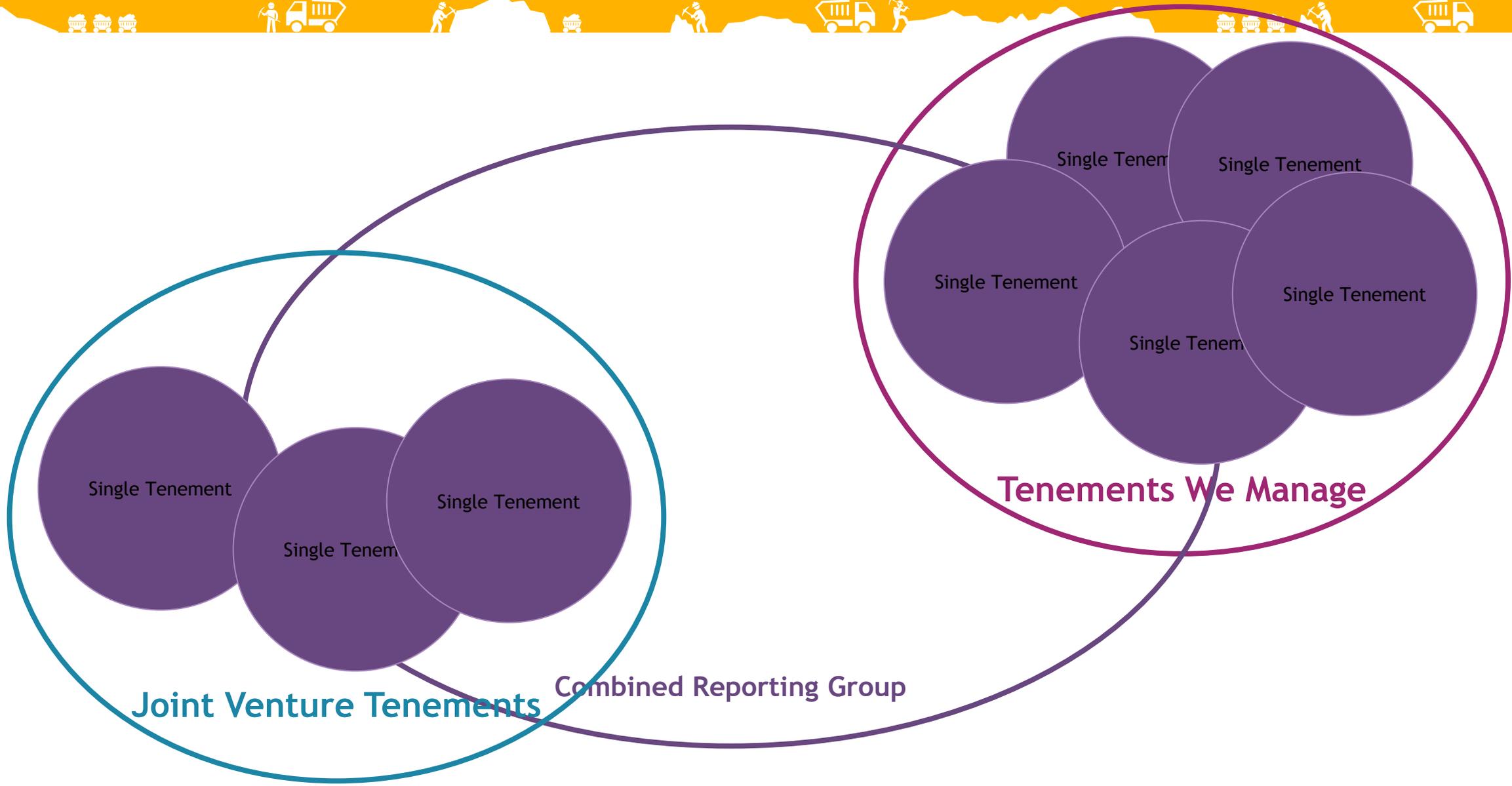
LandTracker Administrator



- Describe the relationships between
  - Tenements and Combined Reporting Groups
  - Tenements and Projects
  - Tenements and Roles
- Manage Groups and Group Types to meet your business needs

- [User Guide: #167 – View Groups](#)



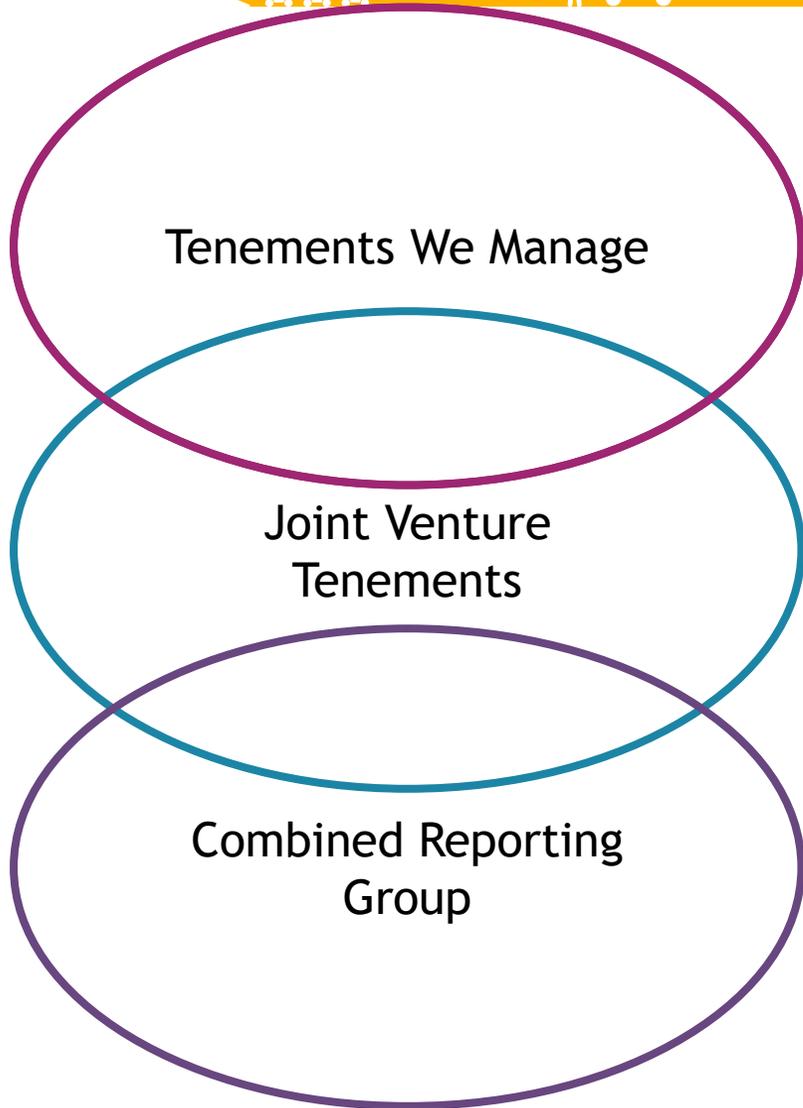


Joint Venture Tenements

Combined Reporting Group

Tenements We Manage

Single Tenement



- Actions
- Tasks
  
- Same actions?
- Different tasks?
  
- Who can access these assets?
- Who can complete these tasks?

# Exercise – Group Configuration

6

- Removing a Group type
- *Regions*
- Why would we want to do this?
- What else can we remove?

# Exercise – Group Management

7

- Create a new Group
- *My Special Project*
- Add Eastern Goldfields tenements to this group



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# Afternoon Tea





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# Global Filters

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- Understand what Global Filters are, and why you would use them
- Create your own Global Filters
- Using Global Filters to restrict a person's access will be covered under User Administration

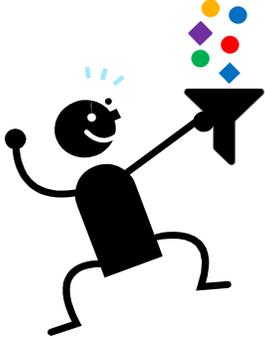
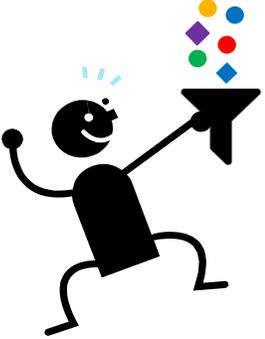
- Based on Group membership(s), e.g.
  - Tenements in the Managed group
  - All Tenements or Agreements for a specific Joint Venture
- Based on links to a Contact, e.g.
  - Tenements with a specific Responsible Geo
  - All Assets that you are linked to (in any field)
- Based on a value that is present in or absent from a field on an Asset, e.g.
  - Specific Holder(s)
  - Tenements and Agreements in a specific Jurisdiction
  - Exclude Dead tenements
- Based on a value in an Asset's Related Data table, e.g.
  - Tenements with an Objection Dealing

# Why would you use Global Filters?

4

- To hide Assets that are no longer current, without having to delete them from your database
- If you have more than one Tenement Manager, each person can filter for just the Assets they are responsible for
- Consultants often filter Tenements by Client
- To lock down another person's access to only show specific Assets, e.g.
  - When giving someone Read access to Tenements in their Project
- ***Bonus:*** *Filtering your Assets makes LandTracker faster because you're viewing a subset of data – great if you have a lot of Tenements!*
- [User Guide: #210 – Global Filters](#)

- You can construct complex filters using Boolean operators:

AND	OR	AND NOT	Brackets
Round and blue	Blue or red	Round and not green	Purple or (round and blue)
			

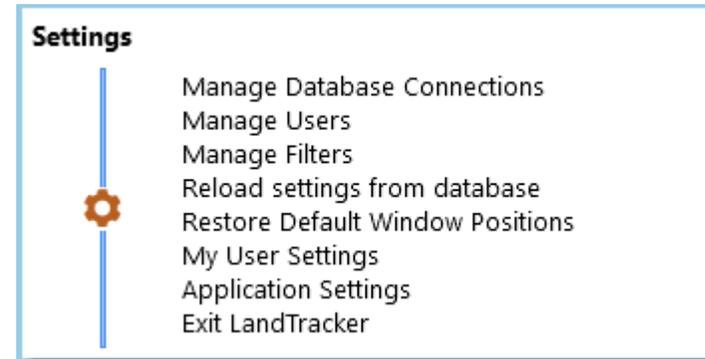
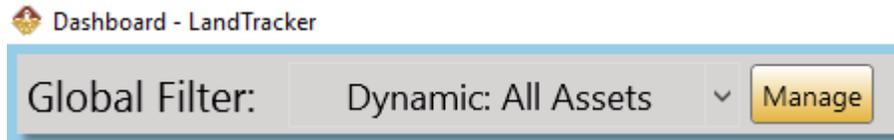
- [User Guide: #210 – Global Filters](#)

# Exercise – Global Filters

- Create a Global Filter based on Group membership
- *Managed group*

# Manage Global Filters

- Click 'Manage' at top of Dashboard or 'Manage Filters' in 'Settings'



- [User Guide: #348 – Manage Filters](#)

# Exercise – Global Filters

- Create a Global Filter based on Group membership
- *In Managed group, not in the Red Bucket project*



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# User Administration

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- Understand how to add a new user to the system and specify what each user can see and do
- Assign appropriate user settings based on requirements and licensing
- Be able to set default Global Filters for each user
- Know what to do if a person's user name or PC ID changes

- Bill

- Is not an Administrator so there are some admin features he can't access.
- He has Editor access, so he can make the same changes to Assets and Actions as an Administrator.
- 'Can User Change Filter' is ticked, so although LandTracker will default to the 'Managed' group, he can change to any other filter as required.
- Can access LandTracker from any PC on the 'OFFICE' network, as long as it is installed.
- [User Guide: #244 - Manage Users](#)

The screenshot shows the 'Manage Users - LandTracker' application window. On the left, a table lists users with their names and administrator status. The user '\*:OFFICE\Bill' is highlighted, and both the name and the administrator checkbox are circled in red. On the right, the configuration panel for this user is shown. The 'Startup Filter' is set to 'Relationship: Managed', and the 'Can User Change Filter' checkbox is checked. The 'Module Permissions' section shows that the user has 'Editor' access for Actions, Contacts, Groups, Tenements, and Agreements. The 'Environmental' permission is currently blank. At the bottom, there are 'Save' and 'Save and Close' buttons.

Type	Name	Administrator
User	GAVINPC:OFFICE\Gavin	<input type="checkbox"/>
User	<b>*:OFFICE\Bill</b>	<input type="checkbox"/>
User	*\Sarah	<input checked="" type="checkbox"/>

**\*:OFFICE\Bill**

User Name: \*:OFFICE\Bill

Administrator Mode:

Startup Filter: Relationship: Managed

Can User Change Filter:

Module Permissions

Actions	Editor
Contacts	Editor
Groups	Editor
Tenements	Editor
Acquisitions	
Agreements	Editor
Environmental	

Comment

Xml Details

3 Item(s) Save Save and Close

## • Gavin

- Has Viewer\* access to Tenements and Actions, but no access to other modules.
- He can't change the filter, so he can only see Tenements that are in the Red Bucket project.
- Gavin can only log on from the PC named 'GAVINPC' on the 'OFFICE' network. If he opens LandTracker on a different PC, a new logon will be created with no permissions.

\* Additional licenses are not required for Viewers.

The screenshot shows the 'Manage Users - LandTracker' application window. On the left, a table lists users with their names and administrator status. The user 'GAVINPC:OFFICE\Gavin' is highlighted with a red box. On the right, the configuration details for this user are shown. The 'Startup Filter' is set to 'Project: Red Bucket' and is also highlighted with a red box. The 'Module Permissions' section shows that the user has 'Viewer' access to 'Actions' and 'Tenements', and 'None' access to 'Contacts', 'Groups', 'Acquisitions', 'Agreements', and 'Environmental'. The 'Can User Change Filter' checkbox is unchecked. At the bottom, there are 'Save' and 'Save and Close' buttons.

Type	Name	Administrator
User	GAVINPC:OFFICE\Gavin	<input type="checkbox"/>
User	*:OFFICE\Bill	<input type="checkbox"/>
User	*\Sarah	<input checked="" type="checkbox"/>

**GAVINPC:OFFICE\Gavin**

User Name: GAVINPC:OFFICE\Gavin

Administrator Mode:

Startup Filter: Project: Red Bucket

Can User Change Filter:

Module Permissions

Actions	Viewer
Contacts	None
Groups	None
Tenements	Viewer
Acquisitions	None
Agreements	None
Environmental	None

Comment

Xml Details

3 Item(s) Save Save and Close

- Sarah

- Is an Administrator\*, which provides full access to all licensed parts of the system, including changing Global Filters.
- Can access LandTracker from any PC on any network, as long as it is installed and can access the LandTracker database. This is useful because Sarah often works from home.

\*Any Editor license may be set up as an Administrator.

The screenshot shows the 'Manage Users - LandTracker' application window. On the left, a table lists users with their names and administrator status. The user '\*\Sarah' is highlighted, and her administrator status is checked. On the right, the configuration panel for '\*\Sarah' is shown, including fields for User Name, Administrator Mode, Startup Filter, and a 'Can User Change Filter' checkbox. A red box highlights the 'Can User Change Filter' checkbox, which is currently unchecked. Below this, a 'Module Permissions' section lists various system modules with their respective permissions. A red box highlights the permissions for 'Actions', 'Contacts', 'Groups', 'Tenements', 'Acquisitions', 'Agreements', and 'Environmental'. At the bottom of the window, there are 'Save' and 'Save and Close' buttons.

Type	Name	Administrator
User	GAVINPC:OFFICE\Gavin	<input type="checkbox"/>
User	*:OFFICE\Bill	<input type="checkbox"/>
User	*\Sarah	<input checked="" type="checkbox"/>

**\*\Sarah**

User Name: \*\Sarah

Administrator Mode:

Startup Filter: Dynamic: All Assets

Can User Change Filter:

Module Permissions

- Actions
- Contacts
- Groups
- Tenements
- Acquisitions
- Agreements
- Environmental

Comment

Xml Details

3 Item(s) Save Save and Close

1. Contact Support for an Azure logon for new user (Azure databases only)
2. Install LandTracker, set up the connection in Manage Database Connections & connect to DB.
  - Azure: enter user name & password that were supplied (password will be encrypted).
  - Non-Azure: copy connection details from your PC.
3. User's logon is automatically created but with no permissions. Close LandTracker and return to your PC.
4. In Manage Users, configure the logon as required.
  - Editor license is required for Editor access to any module, but you can have unlimited Viewers.
5. The new user can now reopen LandTracker and start using it.

- New PC or Username = New LandTracker user account
  - No access to anything
  - No stickies
  - No history
- To fix:
  1. Change old user account to new PC & user name (consider changing PC name to \*)
  2. Delete *new* user account (the one with no access – don't mix them up!)

The screenshot shows the 'Manage Users - LandTracker' application window. On the left, a table lists users:

Type	Name	Administrator	Change Filter
User	BILLPC:MYNETWORK\Bill	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User	NEWPC:MYNETWORK\Bill	<input type="checkbox"/>	<input type="checkbox"/>

The right pane displays the configuration for the selected user, 'NEWPC:MYNETWORK\Bill':

- User Name: NEWPC:MYNETWORK\Bill
- Administrator Mode:
- Startup Filter:
- Can User Change Filter:
- Module Permissions:
  - Actions:
  - Contacts:
  - Groups:
  - Tenements:
  - Acquisitions:
  - Agreements:
  - Environmental:
- Comment:
- Xml Details:

At the bottom, there are 'Save' and 'Save and Close' buttons, and a status bar indicating '2 Item(s)'.



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# Action Definitions

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- Understand the components of an Action Definition and the different types of Action Definition
- Customise an existing Action Definition to correspond with your business processes
- Create a new Action Definition
- Import new or changed Action Definitions to LandTracker
- Modify your custom Action Definitions to incorporate new features from the standard versions
- Display Asset fields on your Actions
- Be familiar with relevant pages in the LandTracker user guide

# Custom fields

Tenement

**Internal Fields**

Responsible Geo Robert Jones  
Managing Company

Tenement Manager David Matthews  
Project

Tenement Template

**Internal Fields**

Responsible Geo {ResponsibleGeo}<sup>8</sup>  
Managing Company {Manager}<sup>10</sup>

Tenement Manager {TenMan}<sup>9</sup>  
Project {Project}<sup>11</sup>

Action Definition

Custom Fields	
Action Field	Asset Field to copy from
{Responsible}	{ResponsibleGeo}
{Manager}	{Manager}
{Relationship}	{Relationship}

Action Template

**Custom Fields**

Relationship {Relationship}<sup>7</sup>

Responsible {Responsible}<sup>9</sup>

Manager {Manager}<sup>8</sup>

Action

🔧 ActionType	Seq	Start Date	Deadline Date	Next Task	Amount	Responsible
Annual Mineral Exploration Report	4	25-Oct-2019	23-Jan-2020	Meet with Exploration Manager		Robert Jones
Rent	5	15-Oct-2020	24-Dec-2020	Notify Geo or Exploration Manager of Rent Due	\$6,047.13	David Matthews



# Exercise – Adding Fields to Actions

- Show the Cost Code field to Actions
- Right click Cog
- Select columns -> Parent ->...

# Exercise – Create a New Action Definition

- Create a new Action Definition on commencement date of agreements
  - Annual compensation meeting
  - Tasks:
    - Calculate compensation amount
    - Review issues past 12 months
    - Schedule meeting
    - Make payment
    - Meeting held; minutes added to Agreement record
- Use an existing Action Definition as a template
- Include all relevant Agreement Types
- [User guide #265 – Creating and Editing Action Definitions](#)



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# Ad Hoc Actions

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- Understand the different types of Ad Hoc Action Definitions
- Create and manage recurring Ad Hoc actions
- Add new Tenement Ad Hoc (pre-defined, single task) action types
- Create a new pre-defined multi-task Action Definition

# Standard Ad Hoc Action Definition

- Generic – can be used for any purpose

## Ad Hoc Action Definition for Tenements

This action definition is the base for an ad-hoc action

Action Trigger	
<b>Asset Type</b>	Tenement
<b>Action Name</b>	Ad Hoc
<b>Interval</b>	On Demand
<b>Deadline</b>	DeadLine = StartDate + 1d

*Note: The Action Trigger defines the logic of the Action. The Deadline is the latest date by which the Action can be completed.*

Task List	
Description	Days Needed Before Deadline
<your action here>	1d

Custom Fields	
Action Field	Asset Field to copy from
{Responsible}	{ResponsibleGeo}
{Manager}	{TenMan}
{Relationship}	{Relationship}

Wiki Page: [Click here for help on how to set up Custom Fields](#)

# Exercise – Recurring Ad Hoc Action

- Create a recurring Ad Hoc action
- [User Guide: #350 – Ad Hoc Actions](#)

# Tenement Ad Hoc Action Definition

- Used for simple one-task predefined actions
- Create a version for Agreements, Groups or Contacts if required

## Tenement Ad Hoc Action Definition

This action definition defines simple (single task) ad-hoc actions that can be used on Tenements

Action Trigger	
<b>Asset Type</b>	Tenement
<b>Action Name</b>	Tenement Ad Hoc
<b>Interval</b>	On Demand
<b>Deadline</b>	Deadline = StartDate

*Note: The Action Trigger defines the logic of the Action. The Deadline is the latest date by which the Action can be completed.*

Action List	
Action	Duration
Pay Fine	20
Lodge Objection	30
Send Letter to Land Holders	10
Attend Warden's Court	5

Custom Fields	
Action Field	Asset Field to copy from
{Responsible}	{ResponsibleGeo}
{Manager}	{TenMan}
{Relationship}	{Relationship}

Wiki Page: [Click here for help on how to set up Custom Fields](#)

# Predefined Ad Hoc Action Definition

- Can include multiple tasks

## Interim Rates Notice (WA) Action Definition

This action definition describes the process for Processing and Paying an Interim Rates Notice.

Editable Content	
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Action Trigger	
<b>Asset Type</b>	Tenement
<b>Action Name</b>	Interim Rates Notice
<b>Precondition</b>	{status} = Live
<b>Interval</b>	On Demand
<b>Deadline</b>	Deadline = StartDate + 30d
<b>Wiki Page</b>	<a href="#">Interim Rates Notices</a>

*Note: The Action Trigger defines the logic of the Action. The Deadline is the latest date by which the Action can be completed.*

Task List	
Description	Days Needed Before Deadline
Confirm Notice Details	14d
Raise PR for Accounts Department	14d
Pay Notice	3d

*Note: Task List items define the Action Status and will have their own trigger dates based on the Days Needed Before the Deadline. Task List items negate the need for separate follow up Actions. You may add in as many Task List items as you wish. If a Task List item has no Days Needed Before Deadline entered then it will default to the previous Task List item Days Needed Before Deadline.*

Custom Fields	
Action Field	Asset Field to copy from
{Responsible}	{ResponsibleGeo}
{Manager}	{TenMan}
{Relationship}	{Relationship}

# Exercise – Predefined Ad Hoc Action

- Create a predefined Ad Hoc Action Definition
- *Section 40e Expiry*
- Refer to Handout



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# Views & Excel Merge

LandTracker Administrator



- Create, edit and delete views
- Sorting and filtering
- Adding, removing and reordering columns
- Grouping the rows in a view
- Organising views
- What's going on in the background? SQL
- Excel Merge

- [User Guide #287 – Working with Views](#)

- [User Guide #285 – Merge to Excel](#)



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# Email Alerts

LandTracker Administrator



- Understand the benefits of using Alerts for a range of scenarios
- Configure Alerts using standard views

- Scheduled Alerts
  - To Alert you/others to urgent Actions
  - To remind you of Actions that need to be performed by yourself and others
  - To remind other people of Actions they need to complete
  - Provide reports to management, e.g.
    - Actions completed
    - Actions you will be performing in the upcoming month
    - Current status of Tenements &/or Agreements
    - *Hint:* You can send these to yourself to review and add extra information before sending them on to management
- On Demand (non-scheduled) Alerts
  - Preconfigure reports that you know others will ask for from time to time, so you can quickly provide the information that has been requested

- Create an Alert:
- *Actions Due in the next 30 Days*
- [User Guide: #295 – Manage Alerts](#)

- Apply a Global Filter to an Alert:
- *Nillibubbica CRG*
- [User Guide: #295 – Manage Alerts](#)



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# Action Reports

LandTracker Administrator



- Understand the standard Action Reports, how they can be used for forecasting and how they differ to Expenditure, Rates and Rent Related Data tables
- Create a custom Alerts Action Report by cloning and modifying an existing one

# Variable (placeholder) fields in Alert views

- #today#
- #lastreportdate#
  - The date the report was last run.
  - To enable views to be viewed and modified in LandTracker, it defaults to *today – 30*.
- #days#
  - This value is populated by the *Days* field in the Alert.
  - To enable views to be viewed and modified in LandTracker, it defaults to *30*.



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# Questions?

LandTracker Administrator



# Thank you!

10

- Please complete a feedback sheet

